The Amazing Stats-At-A-Glance Country *OUTBOUND* Profile System

United Kingdom

2010 Visitor Volume Rank: 3

	Travelers					Spending				Country Economics									
	1) Total Outbound TRAVELERS (m)	2) Total Outbound % Change	3) Visitor Volume To USA (m)	4) USA Share of Outbound (%)	5) Visitor Volume To USA % Change	6) Total Outbound SPENDING ($b)	7) To USA ($b) (travel receipts + pass fare.)	8) USA Share of Outbound receipts only	9) To USA % Change	10) Real GDP % Change	11a) GDP/Capita (000s of constant $US)	11b) GDP/Capita % change	12) GDP PPP/Capita (000s of current $Intl.)	13) Inflation % Change	14) Unemployment Rate (%)	15) Population (millions)	16) Government Debt to GDP Ratio	17) Currency Exchange Rate relative to US$	18) Stock Market Performance (000s)
Country?	United Kingd	formula	United Kingd	formula	formula	United King	United King	formula	formula	United King	United King	formula	United King	United King	United King	United Kingdo	United Kingd	United Kingd	United King
1980	- - -	- - -	1.302	- - -	- - -	na	- - -	- - -	- - -	-2.0	$20.2	- - -	$8.6	16.8	6.5	56.33	46	$2.3263	19) FTSE
1985	- - -	- - -	0.861	- - -	-7	na	- - -	- - -	- - -	3.6	$13.5	3	$12.3	5.2	11.4	56.55	46	$1.2963	1.41
1990	- - -	- - -	2.244	- - -	1	na	$5.65	- - -	17	0.8	$24.6	13	$16.8	7.0	7.0	57.24	33	$1.7847	2.14
1995	41.35	- - -	2.888	7.0	4	$24.9	$8.12	26.7	5	3.1	$24.5	7	$20.3	2.6	8.7	58.03	46	$1.5785	3.69
1996	42.05	2	3.246	7.7	12	$26.0	$8.26	24.8	2	2.9	$25.3	3	$21.2	2.4	8.2	58.16	48	$1.5617	4.12
1997	45.96	9	3.721	8.1	15	$28.5	$9.30	24.9	13	3.3	$27.6	9	$22.3	1.8	7.1	58.31	49	$1.6377	5.14
1998	50.87	11	3.975	7.8	7	$33.5	$9.86	22.7	6	3.6	$29.1	6	$23.3	1.6	6.3	58.48	46	$1.6564	5.88
1999	53.86	6	4.252	7.9	7	$37.0	$10.93	22.7	11	3.5	$29.5	1	$24.3	1.3	6.0	58.68	44	$1.6182	6.93
2000	56.84	5	4.703	8.3	11	$38.4	$12.70	25.9	16	3.9	$28.4	-4	$25.7	0.9	5.5	58.89	41	$1.5161	6.22
2001	58.28	3	4.097	7.0	-13	$37.9	$11.31	22.6	-11	2.5	$27.5	-3	$26.9	1.2	5.1	59.11	38	$1.4400	5.22
2002	59.38	2	3.817	6.4	-7	$41.7	$10.99	19.6	-3	2.1	$29.5	8	$27.8	1.3	5.2	59.32	37	$1.5013	3.94
2003	61.42	3	3.936	6.4	3	$47.9	$11.26	17.9	2	2.8	$33.2	12	$29.1	1.4	5.0	59.56	39	$1.6344	4.48
2004	64.19	5	4.303	6.7	9	$56.4	$12.66	17.0	12	3.0	$38.0	14	$30.7	1.3	4.8	59.85	40	$1.8318	4.81
2005	66.49	4	4.345	6.5	1	$59.6	$13.49	17.9	7	2.2	$37.9	0	$32.1	2.0	4.8	60.24	42	$1.8204	5.62
2006	69.54	5	4.176	6.0	-4	$63.1	$13.31	17.1	-1	2.8	$39.1	3	$33.9	2.3	5.4	60.59	43	$1.8426	6.22
2007	69.45	0	4.498	6.5	8	$71.4	$14.94	17.0	12	2.7	$43.4	11	$35.6	2.3	5.4	60.98	44	$2.0017	6.46
2008	69.01	-1	4.565	6.6	1	$68.5	$16.72	19.2	12	-0.1	$40.2	-7	$36.1	3.6	5.6	61.37	52	$1.8532	4.43
2009	58.61	-15	3.899	6.7	-15	$50.1	$11.43	17.7	-32	-4.9	$32.2	-20	$0.0	2.1	7.5	61.80	68	$1.5645	5.41
2010	0.00	- - -	3.851	- - -	-1	$48.6	$11.57	18.3	1	1.4	$32.6	1	$0.0	3.3	7.9	62.22	76	$1.5461	- - -
2011f	- - -	- - -	3.889	- - -	1	- - -	$12.23	- - -	6	1.1	$34.9	7	$0.0	4.5	7.8	62.64	81	$1.6193	- - -
2012f	- - -	- - -	3.969	- - -	2	- - -	$11.96	- - -	-2	1.6	$36.0	3	$0.0	2.4	7.8	63.07	85	$1.6248	- - -
2013f	- - -	- - -	4.103	- - -	3	- - -	$12.33	- - -	3	2.4	$37.5	4	$0.0	2.0	7.8	63.49	86	$1.6261	- - -
2014f	- - -	- - -	4.292	- - -	5	- - -	$12.90	- - -	5	2.6	$38.9	4	$0.0	2.0	7.4	63.91	85	$1.6277	- - -
2015f	- - -	- - -	4.528	- - -	5	- - -	$13.61	- - -	6	2.7	$40.3	4	$0.0	2.0	7.0	64.33	83	$1.6293	- - -
2016f			4.765		5		$14.33		5	2.7	$41.7	3	$0.0	2.0	6.7	64.76	80	$1.6309	- - -

2011f 20) The Economist The World 2012 Forecasts>> — 0.7 | $39.8 | $36.3 | $39.8 | 2.9 | | 63

Period	08/00		10/00	08/00		10/00	10/00	10/00		10/00	10/00			10/00	10/00	10/00	10/00
Change	12.17		-0.85	-1.66		10.20	-1.14	-7.65		4.22	5.14		2.33	3.34	34.63	0.03	
% ch.	21%		-18%			27%	-9%	-30%		15%	-132%		42%	6%	85%	2%	
CAGR	2.5%		-2.2%			2.7%	-1.0%			1.6%			4.0%	0.6%	7.1%	0.2%	

21) United — Monthly

	09 / 08	10 / 09	11 / 10	An. %
Jan	-19.5%	-5.2%	2.0%	5.2%
Feb	-23.7%	-4.0%	1.0%	6.5%
Mar	-30.7%	8.7%	-11.7%	8.0%
Apr	-13.3%	-17.1%	29.3%	9.2%
May	-10.6%	0.8%	0.7%	8.6%
Jun	-7.4%	-2.1%	-4.9%	8.4%
Jul	-14.9%	0.8%	-2.5%	9.5%
Aug	-13.1%	1.0%	-2.0%	9.9%
Sep	-10.6%	5.9%	-2.6%	9.6%
Oct	-7.5%	5.3%	-6.9%	10.2%
Nov	-16.4%	-0.7%	-3.1%	7.1%
Dec	-11.0%	-9.8%		7.8%
YTD	-14.8%	-0.5%	-0.2%	NOV

24-mo	18-mo	12-mo	6-mo	3-mo
-1.3%	-0.1%	-1.2%	-3.7%	-4.4%

44) I-94 — United / Address 2009 / Total OS 3.899 / Not Rprted. 0.369

Rank				Rank		
1	FL	31.0		6	TX	3.0
2	NY	19.5		7	IL	2.3
3	CA	11.4		8	NJ	2.3
4	NV	7.2		9	WA	2.0
5	MA	3.2		10	CO	1.3

22) US States Visited

Rank	United King 060708	
1	31.1%	FL
2	28.9%	NY
3	17.6%	CA
4	8.8%	NV
5	5.5%	MA
6	5.0%	IL
7	3.8%	TX
8	3.7%	DC
9	3.7%	PA
10	3.4%	NJ

23) Geo-Equity (08): United King 11
24) VWP? 1988

25) Countries Visited (060708)

Sum top 10: 72% United Kingdom

1) 21.3% Spain	6) 3.5% Greece
2) 19.9% France	7) 3% Portugal
3) 5.8% United States	8) 3% Germany
4) 5.7% Ireland	9) 2.3% Turkey
5) 5.4% Italy	10) 2.3% Netherlands

Base: 111% of origin reported in

TREND: Destination-reported volume increased from 31M in 1995 to 77M in 2007. Origin reported from 41M to 69M in 2008. Highest growth on smaller base. Strong growth to most of top 40 or so destinations, especially #5 Italy (+144%), #1 Spain (+59%), #2 France (+38%), #3 USA (+34 %). High growth on lower volume destinations include #20 UAE (+302%), #12 Egypt (+255%), #9 Turkey (+139%), #21 China (+177%), and #18 Thailand (+164%). #3 USA growth of 34% compares to #14 Canada growth of 27% on 640K base.

Key Share / Ranking Metrics

United King	7.6%	26) **2008** Global OUTBOUND Travelers: SHARE of 71	
United King	3	27) **2008** Global OUTBOUND Travelers: RANK of 71	
United King	5.3%	28) **2010** Global OUTBOUND $$$ SHARE OF 182	
United King	4	29) **2010** Global OUTBOUND $$$ RANK OF 182	
United King	6.4%	30) **2010** USA Visitor: SHARE of 217	
United King	3	31) **2010** USA Visitor: RANK of 217	
United King	8.6%	32) **2010** USA Spending: SHARE	
United King	3	33) **2010** USA Spending: RANK of 20 (13 countries later in 2011)	
United King	61%	34) % Vacation / Leisure Travelers (main purpose) **080910**	
United King	Open	Open	
United King	19%	36) Export % of GDP (year varies)	RANK
United King	$ 2,780	37) **2010** $$$ / visitor: SIAT: TOTAL TRIP	15 of 17
United King	$ 1,363	38) **2010** $$$ / visitor: SIAT: IN THE USA	17 of 19
United King	$ 1,275	39) **2010** $$$ / visitor: SIAT: AIRFARE	12 of 18
United King	$ 100	40) **2010** $$$ / visitor / night SIAT: IN THE USA	11 of 19
United King	$ 2,966	41) **2010** $$$ / visitor: BEA TOTAL RECEIPTS	18 of 20
United King	$ 2,248	42) **2010** $$$ / visitor: BEA IN USA RECEIPTS	18 of 20
United King	$ 718	43) **2010** $$$ / visitor: BEA Pass. Fare RECEIPTS	14 of 20

United Kingdom — **45) Currency Details:** Pound Sterling $0.0000 $0.0000 $0.0000

46) Country Commentary: United Kingdom | **47) Target Country?** | DOC?: Yes. Export size. | CTP?: ??? | ???

ECONOMIST-THE WORLD 2012: After the adoption in 2011 of budget tightening amid tepic recovery, austerity will bite in 2012. The short-term outlook is for sluggish growth, austerity, and an angry populace. Public debt will reach 90% as a percentage of GDP by 2015.

ECONOMIST INTELLIGENCE UNIT: Has emerged as a "trail-blazer for austerity", the new government plans to cut the deficit from 11% of GDP to 2.1% of GDP by fiscal year 2014/15.

BUSINESS MONITOR ONLINE: 2011Q1. Host of the 2012 Olympics in London. Outbound shrank over the past few years to 68M, but is expected to re-grow back to 78M+ through 2014. Top destinations are Spain, France, USA, Ireland, Italy, Greece, Germany, Portugal, Netherlands, and Turkey.

2012 release: GDP growth of 1.1% in 2011, +0.8% in 2012, and +1.7% in 2013.DOC CS OFFICES: 2011. long-haul travel expected to remain flat at best due to economic pressure. Shorter trips are popular and value destinations such as Turkey. Popular long-haul markets should be Far East. Caribbean and other markets in the highest Air Passenger Duty Band, including Australia will struggle to maintain market share. Economic factors, price increases, and government cutbacks all point o austere time for the UK consumer, even affecting domestic vacations. Spain is a potent competitor due to all important travel factors (price, product, ease of transportation).   USA remains the top most-favored long-haul destination. After good Jan and Feb, operators now reporting sluggish sales, so remainder of 2011 is uncertain. No real negative attitudes toward USA. New flights in 2010 from Continental and Delta. Air Passenger Duty increase in Nov 2010 could be followed up with another increase in 2011. Unrest in Middle East causing concern over possible increases in fuel surcharges. PowWow in San Fran in 2011 and LA in 2012 bodes well for California, especially coupled with CA's TV marketing in 2011. UK accounts for 25% of Australia's $29M "there's nothing like Australia" marketing budget. Many major competitors spend millions in the UK (South Africa, Malaysia, Jordan, Israel, Cyprus, and more). The UK economic downturn is now affecting all demographic groups, although it is the blue collar C & D workers that are prime target for destinations such as Orlando, that are most likely to suffer most from the price increases and cutbacks and curb travel spending. Some regions of the U.S., e.g. the Western States, may be better insulated as UK travelers to this region tend to be more financially secure. Niche sectors, such as bird watching, will also remain good prospects for UK visitors, it is the mass market destinations favored by mainstream operators that may struggle.

OTHER: MVB: UK TTB: 2010 bookings down 1%-3%. 2011 first half same as last year...better in the second half. No factor emerged as a travel motivator; deterrents are competitor marketing, UK economy, global economy.

Latest TTB-UK r 2010Q1 and 2010Q2. Motivators are lower hotel and air prices and favorable exchange rate. Deterrents are country competition, , economy, INCREASING Air Passenger Duty.

TRAVEL FORECAST POSITIVES: The Euro is already much higher than expected for 2011. Potential for CTP targeting over forecast period is high due to volume/export ranking. Potential for redirect from Japan to other destinations in 2011 but on small 200K base.

TRAVEL FORECAST NEGATIVES: 2010 actual (-1%) even lower versus the 2010 Spring expectation (+2%). Economic recovery is slow and at low levels. Government and household finances are not strong.